Transaction Coordinator (TC) Breakdown of Services

Section I: Transaction Coordination Tasks

Post-Contract Acceptance (Within 24 Hours):

- Review the Purchase Agreement to confirm all vital signatures and dates.
- Verify DRE license numbers for all agents on all documents.
- Notify the Agent of any missing or inaccurate information.
- Send an introductory email to all involved parties (unless the Agent prefers otherwise).

Data Entry & Communication:

- Enter all transaction data into the Brokerage system.
- Generate a timeline and distribute it to the appropriate parties.
- Send timely reminders for upcoming deadlines and missing documents.
- Create Google Calendar events for all contract milestones (unless Agent prefers otherwise).

Document Management:

- Distribute required disclosures for signature/initials to the appropriate parties.
- Order the Natural Hazard Disclosure (if representing the seller) and the Home Warranty (if applicable).
- Review returned documents, share them with the cooperating agent, and maintain the file.
- Upload all documents to the brokerage system and ensure final file compliance.

Closing Process:

- Upload commission instructions prior to Close of Escrow (COE).
- Within 24 hours of closing, upload the Final Closing Statement and update MLS status to SOLD.

Section II: Listings Through Purchase

Listing Procedures:

- Enter the listing into the Brokerage system within 24 hours of receiving executed documents.
- Upload required documents and notify the Agent of any missing items.

Disclosure Package Preparation:

- Prepare the disclosure package via Breeze or Glide.
- Confirm with the Agent that the client is comfortable with eSignatures; arrange alternatives if needed.
- Ensure the disclosure package is ready for delivery upon acceptance of an offer.
- Upon acceptance, proceed with tasks outlined in Section I.

Important Notes:

- **TC does not act in an Associate (Agent) capacity.**
- **TC does not handle contract negotiations or legal questions.**
- **TC does not provide advice to the Agent or any parties involved.**

Certified Transaction Coordinator

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